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ABSTRACT

This resource guide looks at five areas in which freedom of choice can be increased for people with developmental disabilities: assessing needs, planning for services, evaluating services, understanding the service system, and self-advocacy. Needs are assessed through home interviews, personal updates, neighborhood surveys, evaluation of likes and dislikes, and a strengths and needs survey. An Individual Program Planning (IPP) guide, an Individual Transition Planning guide, and Individual Supported Employment Planning guide are included to assist individuals with developmental disabilities to write their own service plans and discuss them at planning meetings. In order to evaluate consumer services, the guide includes a housing checklist, workplace checklist, staff evaluation, IPP checklist, and quality of life survey. To make the service system understandable, a consumer rights statement is provided, and information is offered on how to make by-laws, elections, and grievance procedures more easily comprehendible. Self-advocacy objectives are outlined and accompanied by a bibliography of eight resource materials. (14 references) (JDD)

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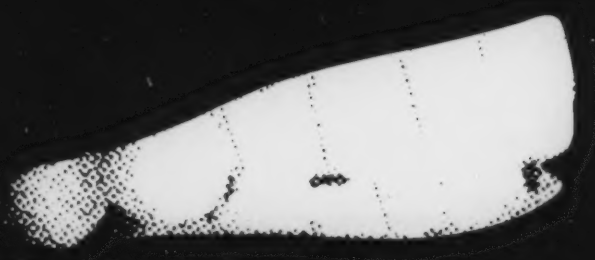

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MINNESOTA—GOVERNOR'S PLANNING COUNCIL ON DEVELOPMENTAL DISABILITIES

PREFACE

It is hoped that the information in this guide is written in a way that is easy to understand. This was done for several reasons:

- so that people with developmental disabilities who read, can read it and use it;
- so that people who advocate for those who cannot read can explain it more easily;
- so that we can all understand something together.

The activities and checklists contained in this guide have been used in a variety of ways. Any of the materials can be copied or changed to meet the needs of people in your area. There is no end to the ways that consumers can become more involved in developing service plans.

Reprinted, October 1989.

by
William T. Allen, Ph.D.

Originally developed for the Association of Regional Center Agencies Integrated Service Systems Project

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"None of us makes our life alone. We each rely on a variety of formal and informal resources to create better life experiences. . . . People with severe disabilities count on more able people's planning and organizing skills for help to identify and coordinate resources to meet life's challenges."

John O'Brien

Hard choices, big decisions. Are these the things I want to learn? Is this the kind of work I want to do? Is this where I want to live? How should I spend my money? Should I get married? Have a family? What will I do when I retire? These are some of the big decisions that all of us must make at different times in our lives.

Then, there are those nagging little ones that become a part of our everyday life. Should I sleep for 10 more minutes? What should I wear? Should I drive to work or carpool? Should I drink another cup of coffee? How about dessert? What's on t.v.? As hard as it may seem, none of us would give up the freedom to make decisions in our everyday lives.

The first step. Social workers, case managers and advocates can help people with developmental disabilities get the services and training they need to be more independent and productive members of the community. They can also help people increase their freedom of choice.

This resource guide will look at five ways that you can help increase the freedom of choice for people with developmental disabilities:

- Assessing needs
- Planning for services
- Evaluating services
- Understanding the service system
- Self-advocacy

An example. One of the first checklists you will find on the following pages is the Individual Program Planning Guide. If you decide to use it, the agenda you would follow for the individual annual planning meeting might look like this:

- **Introductions.** Everyone who is attending the meeting states who they are and how they can help support the consumer.

- **Purpose of the meeting.** It is explained that the purpose of the meeting is to share information about strengths and needs and to come up with some plans that will help the consumer become more independent and productive now and in the future.

- **Sharing information.** This is a chance for the consumer and those who work with him or her to talk about strengths and needs at home, at work and in the community. This is a time to review the Individual Program Planning Guide or the Home Interview, etc. In addition, the consumer may have made an audio tape of his or her ideas about the future.

- **Making plans.** This is the time to develop plans for the next year which will help the consumer be more independent and productive at home, at work and in the community. Everyone must agree on them and the consumer has the last word.

Other Considerations. It is hoped that you decide to use many of these checklists and activities in your work. There are a few additional ideas to remember when adapting them to the needs of people with developmental disabilities in your area:

- **Language differences.** You might want to have the materials translated into different languages.

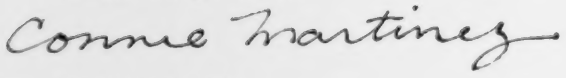
- **Ethnic-cultural differences.** You might want to consider where to hold the home interview, planning conference, etc. based on personal preference.

- **Procedural differences.** Agencies have different procedures regarding planning and evaluating services, etc. These materials can be cut and pasted to work around those differences.

A

CONSUMER-BASED NEEDS ASSESSMENT

"My parents always had a dream for my brothers and sisters for when they grew up, but nobody had a dream for me, so I never had a dream for myself. You can never have a good life if nobody ever has a dream for you, unless you learn to have a dream for yourself."



Capitol People First

Asking people what they need is one way to help start thinking about what they want for themselves now and in the future. This section includes two samples of how to include people with developmental disabilities in assessing need for services:

HOME INTERVIEW

Ideas on how to use it

The Home Interview was written so that people with developmental disabilities can become more involved in developing their own training goals for where they live and work. Community-based training programs should be encouraged to use it or a similar tool.

Complete the Home Interview at the time of the annual review with the consumer, parent or residential and work service providers, and other interested persons.

At the end of the Home Interview, review the general kinds of service plan objectives you will be writing and ask for a summary from other service providers as well. Most important, ask the consumer if these are the kinds of things that he or she wants to work on.

To: Consumers, Parents and Residential Service Providers

Once each year, your residential and work service providers will sit down with you to fill out the attached home interview form. The information helps us to understand what people can do and what they want to learn to do. All of the interview forms are written in the first person, so that they can be filled out by the consumer or a parent or friend if help is needed.

The following pages contain:

- The **Home Interview Coversheet** which is filled out before meeting with you.
- A **Personal Update** which asks some questions about where you live, medical information, etc.
- A **Neighborhood Survey** which asks some questions about the streets, friends and places that you visit in the community.
- **Likes and Dislikes** which looks at the activities and foods that you like and dislike and things which might keep you from community activities.

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the Home Interview on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the Home Interview.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the Home Interview.

- A **Strengths and Needs Survey** which lists the things that you can do or need help with at home, in the community, in recreation/leisure activities and at work.
- A **Summary Sheet** where we can sum up what we talk about.
- A **Feedback Form** which you can fill out and send back to us after the home interview.

A copy of the home interview will be sent to you before we meet, so you may start to think about your answers. It's yours to keep and to write notes on.

After the home interview is completed, training objectives will be written into your individual service plan with your approval. These objectives will help guide the people where you live and work about the things you need help on and want to learn. Thank you for letting us come into your home for this interview. As you can see, the information is very important to everyone.

HOME INTERVIEW: AN EXAMPLE OF HOW IT WORKS

Here is an example of how a Home Interview could be used to set up a training plan:

John is twenty-eight years old and lives with three other people in a community residence. After completing a Home Interview, some of the things that we found out about John are that he:

- lives on a busy street with signals and crosswalks;
- visits a friend who lives several blocks away when he can get someone to drive him;
- goes to the mall, movies, fast food restaurants, and the library on a weekly basis;
- likes most foods, music, card games, outdoor sports and yardwork;
- gets along with his house mates;
- has no problems when traveling in the car, eating in restaurants, or on outings in the community;
- is good at completing easy household chores and taking care of his own personal needs;
- needs help in crossing the street, identifying himself to others, ordering food in a restaurant.

With this important information, John and the staff who work with him at home and at work were able to set up a training plan which included the following goals:

John will be able to identify himself to others.

John will be able to order a basic meal in a restaurant.

John will work on the landscape crew.

These are things which will help him live more independently and which can be worked on both at home and at work. This is an example of how the Home Interview can work for everyone.

HOME INTERVIEW COVERSHEET

This should be filled out before the interview. Don't forget to send the Home Interview to the consumer & service providers before your appointment.

Consumer: _____ Date of Birth: _____

Address: _____

Parent/Residential Service Provider: _____ Telephone: (home) _____ (work) _____

Directions to Place of Interview:

_____

_____

_____

_____

INTERVIEW SCHEDULE

Date: _____ Time: _____ Interviewer: _____

Place of Interview: _____

Present: _____

HOME INTERVIEW GUIDELINES

Things to remember:

- Make sure that you pick a time that is convenient for everyone;
- Make sure that the consumer is home if at all possible;
- Everyone who is present should be involved in the interview process;
- Make sure that the consumer is the 'center' of the interview.

Things to take along with you:

- The Home Interview packet;
- An extra blank copy to leave at the home;
- Last year's Home Interview report (if applicable);
- Other information that will help complete the interview;
- A self-addressed, stamped envelope for returning the feedback sheet.

PERSONAL UPDATE

LIVING ARRANGEMENT

How long have you lived in this home? _____

Is this your _____ own home _____ parent's home _____ a community residence
_____ other: _____

Do you _____ have your own room _____ share a room with someone

How many others live in the home? _____

How do you get along with others in the home? _____ very well _____ okay _____ not so well

If 'not so well', how come?: _____

Do you have relatives who live in this area? ☐ yes ☐ no

If yes, who? _____ How often do you visit? _____

MEDICAL INFORMATION

Are you currently using any prescription medications? ☐ yes ☐ no

If yes, please name the drug and when taken: _____

_____

_____

_____

When was your last physical? _____ Who is your physician? _____

Did any problems show up on the physical? ☐ yes ☐ no

If yes, please describe: _____

Who is your dentist? _____

Any other health concerns? _____

_____

OTHER INFORMATION

Are you currently receiving: _____ SSI _____ SSDI _____ Other: _____

If you are, who is the payee? _____

Do you have a guardian or conservator? ☐ yes ☐ no

If yes, who? _____

Other Notes:

HOME INTERVIEW LIKES AND DISLIKES

To help us in planning, it's important to get an idea of what you like to do/can do and what you do not like to do/need help to do.

FOODS (Snacks, treats, special diet?)

What kinds of food do you like? _____

_____

_____

What kinds of food do you dislike? _____

_____

_____

ACTIVITIES (Hobbies, sports, outings, places or events?)

What kinds of things do you like? _____

_____

_____

What kinds of things do you dislike? _____

_____

_____

CONCERNS

Are there times when you have problems that would keep you from community activities? (For example, toileting accidents, hitting others, taking things, loud screaming, wandering off, etc.)

Around the house? ☐ yes ☐ no

If yes, what? _____

_____

What happens when you do this? _____

_____

_____

During meals? ☐ yes ☐ no

If yes, what? _____

_____

What happens when you do this? _____

_____

_____

Traveling in the car? ☐ yes ☐ no

If yes, what? _____

_____

What happens when you do this? _____

_____

_____

In the community? ☐ yes ☐ no

If yes, what? _____

_____

What happens when you do this? _____

_____

_____

HOME INTERVIEW NEIGHBORHOOD INVENTORY

This 'map' of the neighborhood will help develop a picture of where people live, work and play. It should be filled out first.

STREETS

What are the streets in your neighborhood that you use a lot? How do you use them?

Street Name	Walk/Car/Bus?			If you walk, are there Signals/Crosswalks?	
_____	____W	____C	____B	____S	____C
_____	____W	____C	____B	____S	____C
_____	____W	____C	____B	____S	____C
_____	____W	____C	____B	____S	____C

FAMILY & FRIENDS

Where are the homes of family and friends that you visit? How do you get there? How often do you visit?

How far away?		Walk/Car/Bus?			How often?			
		W	C	B	Daily	Weekly	Monthly	Other
____1-5 blocks	____5+ blocks	____	____	____	_____	_____	_____	_____
____1-5 blocks	____5+ blocks	____	____	____	_____	_____	_____	_____
____1-5 blocks	____5+ blocks	____	____	____	_____	_____	_____	_____
____1-5 blocks	____5+ blocks	____	____	____	_____	_____	_____	_____

COMMUNITY

Where do you go in the community? How do you get there? When? How often? (For example, stores, outings, library, movie, doctor, dentist, etc.)

Place/City	Walk/Car/Bus?			When?		How Often?			
	W	C	B	Weekday	Weekend	Daily	Weekly	Monthly	Other

HOME INTERVIEW STRENGTHS & TRAINING NEEDS

This is an opportunity to talk about the things that you like to do or can do and to think about the things that will help you be more independent in the community.

COMMUNITY STRENGTHS

Here are some examples of places where people go in the community:

grocery store	department store	shopping mall
laundromat	repair shop	convenience store
fast food restaurant	sit down restaurant	ice cream parlor
doctor's office	dentist's office	beauty shop
barber shop	health club	YMCA/YWCA
track	concert	swimming pool
recreational park	sporting event	bowling alley
skating rink	pool hall	tennis court
video store	library	movie theater
club	ball park	basketball court

Where do you go and what do you do there?

Place:	**Activities:**
Example:	Example(s):
Grocery Store	Shop from a list, uses head pointer to select item, wait in line

COMMUNITY TRAINING NEEDS

Here are some examples of places where people go in the community:

grocery store	department store	shopping mall
laundromat	repair shop	convenience store
fast food restaurant	sit down restaurant	ice cream parlor
doctor's office	dentist's office	beauty shop
barber shop	health club	YMCA/YWCA
track	concert	swimming pool
recreational park	sporting event	bowling alley
skating rink	pool hall	tennis court
video store	library	movie theater
club	ball park	basketball court

Where and what would you like to learn to do in the community?

Example: Get a haircut at the barber shop.

What gets in the way?

Example: I don't know how to take the bus.

RECREATION & LEISURE STRENGTHS

Here are some examples of things that people do for fun:

frisbee	ball games	t.v.
skateboard	bike	skating
swimming	exercise bike	jogging
aerobics	computer games	electric games
board games	cards	coins
records	tapes	books
sewing	assemble models	knitting
visit friends	dancing	radio

What do you do for fun?
Example: Listen to music tapes.
Activity:

Where do you do it?
Example: Library
Place:

RECREATION & LEISURE TRAINING NEEDS

What you would like to learn to do for fun?
Example: Play the tape recorder.

What gets in the way?
Example: I don't understand the buttons.

HOME CHORE STRENGTHS

Here are some examples of things that people do at home:

handwashes dishes	dries dishes	operates dishwasher	cook packaged foods	cooks frozen foods
empties garbage	cleans counters	uses microwave oven	empties trash	makes sandwiches
sets table	clears table	makes bed	cleans spills	washes windows
strips bed	hangs up clothes	puts clothes in drawer	mops	bakes in oven
operates washer	operates dryer	folds laundry	cares for pets	
puts laundry away	irons	uses a blender	vacuums	
cleans sink	cleans bathtub	cleans toilet	dusts	
waters lawn	pulls weeds	mows grass		
sweeps sidewalk	uses toaster	rakes leaves		

What chores do you do at home?
Example: Make my own bed.
Activities:

HOME CHORE TRAINING NEEDS

What would you like to learn to do or do better at home?
Example: Make my own lunch.

What gets in the way?

Example: I can't follow a recipe.

WORK STRENGTHS

Here are some places people go to work:

lumberyard	doctor's office	library
restaurant	hospital	car dealer
grocery store	convenience store	bank
hardware store	motel/hotel	movie theater

Here are some examples of things that people do at work:

follow directions	go to work on time	ask for help
completes work	get along with others	take the bus
buy snacks	take breaks	eat lunch
use the restroom	lift things	keep busy

Where have you worked?
Example: Restaurant
Places:

What did you do there?
Example: Bus dishes
Job Tasks:

WORK TRAINING NEEDS

Where/what would you like to learn to do for work?
Example: Landscape nursery.

What gets in the way?

Example: He doesn't understand money.

HOME INTERVIEW SUMMARY SHEET

Name of Consumer: _____

Date of Interview: _____

What do we know about your neighborhood? _____

_____

_____

What do we know about your likes and dislikes? _____

_____

_____

What do we know about your strengths? _____

_____

_____

What things have you decided you would like to work on with us?
Community

_____

_____

Recreation/Leisure

_____

_____

Home Chores

_____

_____

Work

Other

HOW WAS THE HOME INTERVIEW?

When your home interview is finished, please take a few moments to answer the questions below and then send the answers in the self-addressed, stamped envelope attached to the Home Interview packet. We will use your feedback to help make the home interview better.

	YES	NO
1. Was the interview held at a convenient time for you? If no, what time would be better: _____	☐	☐
2. Was everyone at the home interview who needed to be there? If no, who else should have been there? _____	☐	☐
3. Is the purpose of the home interview clear to you?	☐	☐
4. Do you know what will happen with the information?	☐	☐
5. Did all of your questions get answered? If no, what other questions do you have?	☐	☐

6. What were the best things about the interview?

7. What could have been better?

Don't forget to mail this back to us. Thanks!

AREA-WIDE NEEDS ASSESSMENT

How to use it

A method for including people with developmental disabilities in gathering needs assessment information for the area where you live.

If you hold annual town meetings, make sure that you include consumers. One way to help is to provide all of the information 6-8 weeks before the meeting. This lets people work on it in smaller groups where they live or work. It also offers a better chance that people will participate in the town meeting and not just attend.

Another way is to assist consumers in holding a needs assessment workshop. Using an adapted version of the nominal group process (this works with professionals as well), consumers have a chance to talk about where they have been, where they are going and how they will get there.

ADAPTED NOMINAL PROCESS: A TASK ANALYSIS

1. Getting people together
   - You can hold an area-wide workshop and invite everyone; or
   - Ask people to send representatives from their area; or
   - Hold smaller workshops where people live and work.
2. Materials
   - A place to hold the workshop.
   - Flip-chart paper, marking pens and tape.
   - A tape recorder or video-tape (optional).
   - Accessible bathrooms
3. The workshop
   - Introductions
   - A workshop leader
     a. This always works best when a consumer leads the workshop.
     b. Recorders (writers) are usually support staff.
   - The rules
     a. Anyone can say anything
     b. Try to talk about what everyone else is talking about
     c. Don't talk while someone else is talking
   - Activity #1 – Where We Have Been (optional)
     During this time, people get a chance to talk about the past, like —
     where they used to live and work
     what was good about the past
     what could have been better

All thoughts are written on the flip-chart paper in summary statements, like —
- lived with parents
- like going to school
- didn't make any money

- Activity #2–Where We Are

During This Time, people get a chance to talk about the present, like —
- where they live and work
- what is good about the present
- what could be better

All thoughts are written on the flip-chart paper in summary statements, like —
- live in a house with my friends
- like going to work
- don't make enough money

- Activity #3–Where We Are Going

During this time, people get a chance to talk about the future, like —
- where they want to live and work
- what things will make life better

All thoughts are written on the flip-chart paper in summary statements, like —
- live on my own
- a new job
- make more money

- Activity #4–How to Get There (Optional)

During this time, people break into small groups and look at the statements they have made about where they are going (they have been grouped into areas, like transportation, living, working, etc.) Now, it's time to think of some ways to get there. Each group lists —
- what is the biggest problem?
  - e.g. not enough buses
- what are some examples?
  - e.g. you can't get downtown on the weekend, some don't have lifts, the bus drivers aren't nice
- what could we work on first?
  - e.g. more buses on the weekend
- how will we do it?
  - e.g. write a letter to the bus company and ask for a meeting

4. Time

- This depends on whether or not you use all of the activities. If you just use activities #2 & #3, you should count on 2 hours and if you use all four activities, you should allow 4-5 hours.

5. A sample

- The following pages provide a sample of a completed summary report.

SUMMARY OF THE CONSUMER NEEDS ASSESSMENT WORKSHOP

North Bay Regional Center
Napa, California
July 1, 1981

SAMPLE

In 1981, 31 people with developmental disabilities from 13 programs in Napa, Solano and Sonoma counties met to talk about their needs. Using an adapted nominal process, consumers talked about the past, present and future. These comments were placed into groups named transportation, work, residential, social recreation and benefits.

People then chose one of these five groups and worked together to choose the major problems and suggest ways to solve them.

Below you will find a summary of the future and the major problems as seen by those consumers in 1981:

WHERE WE'RE GOING

- More work and more pay
- Better transportation
- Recreation activities
- Counseling services
- More say in our lives
- Better wheelchairs
- Jobs in the community
- Help in moving from the hospital to the community
- Get married
- A place for people to learn about who we are
- Training in independent living

BIGGEST CONCERNS

- Not enough pay and not enough work.
- Public transportation isn't good enough for people with disabilities.
- Not enough money to start homes and get the best people to work in them; too much paperwork and politics.
- The system is too slow and too hard to understand.
- No support for community recreation programs.

DEVELOPING CONSUMER-BASED SERVICE PLANS

B

There are several ways to find out what services are needed by people with developmental disabilities:

- **ask;**
- **observe; and**
- **ask others.**

Choosing the kinds of services that people want is one of the most important steps in encouraging freedom of choice.

The I.P.P. guide was written so that people with developmental disabilities can become more involved in writing their own service plans.

Provide it to the consumer 6-8 weeks before the planning meeting. This allows for time to complete it with or without assistance from someone else.

It could be placed on an audio tape for those who cannot read.

An audio tape of the consumer's ideas for the service plan could be made for those who are nervous about speaking to a group.

Include time to review the guide during the service plan meeting.

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the planning activities on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the planning activities.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the planning activities.

FOR PEOPLE WHO WANT TO HELP WRITE THEIR OWN I.P.P.

This workbook was written to help people get ready for their Individual Program Plan (I.P.P.) meeting. The Individual Program Plan is your map to the future. Just like a map, it can tell you the right direction to go. To make sure that this map or plan gets written in the best way, you need to help work on it.

One way to do that is to sit down and decide what you can do and would like to do now and in the future. This workbook will help you think about those things.

Originally developed for the
Area IV Board on
Developmental Disabilities
by William T. Allen

Some words and terms you should know

Future: One to five years from today.

Goal: This tells the general direction a person is going in, like "living in an apartment or working for money."

Individual Program Plan: This is a written plan which tells a person's strengths and needs. It also lists goals and objectives for things that a person wants to learn now and in the future.

Need: This tells what a person wants to learn or do, like "use the bus, or count money or order food in a restaurant."

Now: Six months to one year from today.

Objective: This tells how and when a goal will be reached, like "learn to clean clothes in a washer and dryer by June of 1989."

Strength: This tells what a person can do, like "make the bed or buy things at the store or read."

If there are other words or terms that you want to ask someone about, just write them down:

Word or Term	What it Means

SOME THINGS TO THINK ABOUT

1. The Individual Program Plan must list things that will help improve someone's skills or solve their problems in a certain way and in a certain amount of time - like "John will make a purchase of a snack item or soda in a store all by himself by the end of the year."
2. People learn things best in the places where they happen - like shaving in the bathroom or making a bed in the bedroom.
3. People learn things best when they use the real item - like using real money when learning how to count.
4. People learn things best when they do them at the time they are usually done - like brushing teeth after a meal or before going to bed.
5. People learn best from people - like learning how to work in places where other people work.
6. People learn best when the things that they learn are useful - like using the telephone or how to write a check.
7. It is important to think about things to learn that will help you become more independent where you live and work right now and where you will live and work in the future.

THINGS ABOUT YOU

HOME

Where do you live now?
☐ in the city ☐ in the country

Where do you want to live?
☐ in the city ☐ in the country

How do you live now?
☐ with other people ☐ on my own

How do you want to live?
☐ with other people ☐ on my own

What kinds of help do you need?
☐ none ☐ help with cooking ☐ help with chores ☐ help with eating
☐ help with getting dressed

WORK

What kind of work do you do now? _____

What kinds of work do you want to do? _____

COMMUNITY

What kinds of places do you go to after work or school and on the weekends?

_____

_____

_____

How will they get to and from work or school? _____

_____

RECREATION

What kinds of things do you do for fun? _____

_____

_____

KNOWING YOUR STRENGTHS AND NEEDS

Take a few moments to think about your strengths (what you do well, like buying things at the store) and needs (what will help you do things on your own, like learning to use the bus) and then write them down. Get someone to help you with this, if you need it.

STRENGTHS
(What you can do & like to do)

At home:

At work:

In the community:

For fun:

NEEDS
(What will help you on your own)

At home:

At work:

In the community:

For fun:

Deciding what to work on

Now it's time to start thinking about what things should be written into your I.P.P. The best way to do this is to think about what will help you do the things you like to do and need to do.

Your social worker can help you with this, but you need to decide what you want help with now and later.

Look back at your strengths and needs list and place each need that you wrote down on one of the lists below:

Things I need help on right now (six months to 1 year from now)

(Example:) Using money

Things I need help on later (1 to 5 years from now)

(Example:) A new place to live

Getting Ready for the I.P.P. Meeting

Here are some things to do before the meeting:

- Review what you have written in this workbook.
- Review your I.P.P. from last year.
- Write down any questions you want to ask.
- Ask who else will attend the meeting and make sure that no one else is left out.
- If you want help from someone else during the meeting, then ask for an advocate.

Here are some things to do at the meeting:

- Show people this workbook and talk about the things you want help on right now.
- Be positive.
- Ask questions.
- Take notes or bring a tape-recorder.
- Remind people that it's their job to help get the things you need to be more independent at home, at work and in the community.
- Ask for a fair hearing if you do not agree with the things that are written in your Individual Program Plan.

How to Tell If the I.P.P. Is Working

About every six months, you should look at your Individual Program Plan to see if things are going the way they were written. You should ask yourself the following questions:

	YES	NO
1. Are you learning to do things on your own?	☐	☐
2. Are you learning to work and live with people who are not disabled.	☐	☐
3. Are you working where you want to?	☐	☐
4. Are you living where you want to?	☐	☐
5. Do you get to see your friends?	☐	☐

Are there things that could be better?

If there are a lot of "no" answers to these questions or if things could be going better, then you should talk with your social worker about ways to make things right.

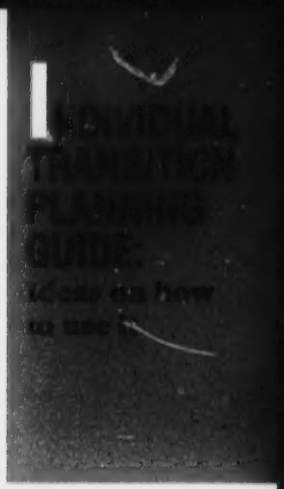
The I.T.P. guide was written so that people with developmental disabilities and their parents can become more involved in writing their own transition plans.

Find out about the transition plan process in the local school district and get involved.

This planning guide will be useful even if there is no formal process. Information developed in this workbook can be written into the I.E.P. if there is no Individual Transition Plan.

An audio tape of the consumer or parent's ideas for the I.T.P. could be made for those who are nervous about speaking to a group.

Include time to review the guide during the I.T.P. meeting.



ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the transition activities on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the transition activities.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the transition activities.

Original versions developed
for: Sonoma County
Transitions Project Area IV
Developmental Disabilities
Board
by William T. Allen

WHAT THIS WORKBOOK IS ALL ABOUT

The **Transition Planning Guide** (TPG) is designed to help students and their families in planning for the future. It should be used to help you get ready for your transition plan meeting.

The language of this guide is meant to encourage:

- people with disabilities to fill it out on their own;
- families and advocates to explain it to people with disabilities who cannot fill it out on their own.

Each activity is an important step in preparing for the Individual Transition Plan (ITP) meeting. Families, advocates and students should work together when filling it out. It will help:

- identify personal strengths and interests
- identify goals for the future.

WHAT IS AN INDIVIDUAL TRANSITION PLAN?

The **Individual Transition Plan** is a written plan which outlines what a student will need to live, work and enjoy life as an adult. It should be written at least four years before someone is leaving school. The I.T.P. is written with the help of the student, parent, teacher, case manager and adult service provider. It spells out what everyone needs to do in order to provide the training and services needed for a smooth 'transition' from school. It is a bridge between the Individual Education Plan and other plans — like the Individual Program Plan.

OTHER WORDS & TERMS YOU SHOULD KNOW

Goal: This tells the general direction a person is going in, like "living in an apartment or working in the community or attending classes at the community college."

Individual Education Plan: The I.E.P. is written for students who receive special education services. This is a written plan which tells a student's present strengths as well as educational goals and objectives for the school year. It contains specific plans for teaching skills which will help people be more independent.

Individual Program Plan: The I.P.P. which provides general goals in areas other than education like work and recreation/leisure.

Special Education: Services for students who are not succeeding in regular education and need additional educational experiences in order to become independent and productive adults.

Transition: A carefully planned process which helps students move from school to adult life in the community.

Other words and terms you want to know:

Word or Term	What it Means

YOUR INTERESTS, LIKES & DISLIKES

Take a few moments to think about the things that you like to do best (like swimming or listening to music) and things you don't like to do. Get someone to help you with this, if you need it.

What do you like to do best?

At home:

At school:

At work:

In the community:

For fun on your own:

For fun with others:

Are there things you don't like to do?

At home:

At school:

At work:

In the community:

THINKING ABOUT THE FUTURE

Name: _____ Date: _____

When do you plan to graduate? _____

Employment & Education: A place to work & train after graduation

1. Where do you work or go to school now?

_____

_____

2. Where do you want to work or go to school after you leave high school?

_____

_____

Living Arrangements: A place to live

1. Where do you live now?
   - _____ at home
   - _____ on my own
   - _____ other: _____
   - _____ supervised residence
   - _____ with a roommate

2. Where do you want to live after you leave school?
   - _____ at home
   - _____ on my own
   - _____ other: _____
   - _____ supervised residence
   - _____ with a roommate

Community Recreation & Leisure Activities: Things for fun:

1. What kinds of things do you do for fun at home, in the neighborhood, community?

_____

_____

2. What kinds of things would you like to do for fun at home, in the neighborhood, community after you leave school?

_____

_____

A CHECKLIST FOR YOUR MEETING

Now it's time to start thinking about what things should be written into your transition plan. The best way to do this is to think about what will help you most to live and work where you want to and to enjoy your free time.

Your family, teacher or social worker can help you with this, but you need to look at the list below and place an "X" next to the 3 things that you want to talk about the most at your transition meeting. If you want to talk about more things, then just say so at the meeting.

EMPLOYMENT & EDUCATION:

A place to work & train after graduation

- What kinds of jobs would you like?
- Would you like to work on your own or with others?
- Are there training services that would help you after high school, such as the community college or adult education?
- How will you get to and from work or school?
- Things you might want more information about (please check as many as you want).
  - ☐ supported employment
  - ☐ community colleges
  - ☐ competitive employment
  - ☐ rehabilitation facilities
  - ☐ community education and training
- What kinds of help do you need from others?

LIVING ARRANGEMENTS:

A place to live

- Where do you want to live (in the city, in the country)?
- How do you want to live (with other people, on your own)?
- Things you might want more information about (please check as many as you want)
  - ☐ family care home
  - ☐ foster care
  - ☐ semi-independent
  - ☐ independent
  - ☐ intermediate care facility
- What kinds of help do you need (none or do you need help with cooking and cleaning) from others?

COMMUNITY RECREATION & LEISURE ACTIVITIES:

Things for fun

- What kinds of things will you do for fun at home, in the neighborhood, community?
- Things you might want more information about (please check as many as you want)
  - ☐ parks and recreation
  - ☐ community center
  - ☐ hobby clubs
  - ☐ sport or social clubs
- What kinds of help do you need from others?

PERSONAL MANAGEMENT:

Other training

- Taking the bus?
- Doing the laundry?
- Things you might want more information about (please check as many as you want)
  - ☐ social skills
  - ☐ money management
  - ☐ personal care
  - ☐ household management
- What kinds of help do you need from others?

HEALTH & MEDICAL

Staying healthy

- Do you need special medicines?
- How will you get to the doctor?
- Things you might want more information about (please check as many as you want)
  - ☐ dental care
  - ☐ health insurance
- What kinds of help do you need from others?

FINANCIAL & INCOME

Money matters

- How much money will you need to live on (for rent, food, fun)?
- What about insurance, benefits, taxes, SSI/SSDI?
- Things you might want more information about (please check as many as you want)
  - ☐ other benefits
  - ☐ social security benefits
- What kinds of help do you need from others?

FAMILY LIFE & SOCIAL RELATIONSHIPS

Doing things with other people

- Where do your friends live?
- Will there be chances for you to have fun with people at work, home, with family and friends?
- Do you need information or training about family life or dating?
- How will you get to see your friends?
- Things you might want more information about (please check as many as you want)
  - ☐ home attendant
  - ☐ respite care
  - ☐ churches
- What kinds of help do need from others?

ADVOCACY, LEGAL & LONG-TERM SUPPORT:

Someone who can be there when you need it

- Do you need an advocate, counselor, support group?
- Things you might want more information about (please check as many as you want)
  - ☐ guardianships
  - ☐ trusts and wills
  - ☐ conservatorships
  - ☐ legal assistance
- What kinds of help do you need from others?

OTHER THINGS THAT YOU NEED TO LEARN ABOUT:

YOUR TRANSITION PLAN MEETING

Here are some things to do before the meeting:

- Review what you have written in this workbook?
- Review your I.E.P., I.P.P. and I.T.P. from last year.
- Talk to your transition plan coordinator (that's probably your teacher) to make sure that you know what will happen at the meeting.
- Write down any questions you may want to ask.
- Ask who else will attend the meeting and make sure that no one is left out. Please invite everyone who will be helping you work on this plan, like families, brothers & sisters, careprovider, case manager, and so on.
- If you need special help at the meeting (like an interpreter), then ask for someone to be there.
- If you want help from someone else during the meeting, then ask for it.

Here are some things to do at the meeting:

- Show people this workbook and talk about the things you want to do after you leave high school.
- Be positive, this is your meeting and everyone there wants to help.
- Ask questions.
- Take notes, bring a tape-recorder or bring someone to take notes for you.
- Remind people that you're here to write a plan which will help you be more independent at home, at work and in the community.
- Ask for help if you do not agree with the things that are written into your Individual Transition Plan.

HOW TO TELL IF THE PLANNING MEETING WENT WELL

When your transition plan meeting is over, fill out this worksheet.

	YES	NO
1. Were all of the people that you wanted at the meeting?	☐	☐
2. Did everyone look at the things that you wrote in this workbook?	☐	☐
3. Did you and your family, advocates, friends help decide what was written on the Individual Transition Plan?	☐	☐
4. Did you get information about the kinds of services you might need after graduation?	☐	☐
5. Did you talk about all of the things on –		
Your interests, likes and dislikes	☐	☐
thinking about the future	☐	☐
6. Did you get to ask questions?	☐	☐
7. Did all of your questions get answered?	☐	☐
8. Are there transition goals for everything you marked on **A Checklist for Your Meeting?**	☐	☐
9. Are there dates for completing your transition goals?	☐	☐

10. What were the best things about the meeting?

11. What could have been better?

If there are a lot of "no" answers to these questions, then you should ask to have another transition planning meeting.

How to Tell If the Transition Plan Is Working

About every six months, you should look at your Individual Transition Plan to see if things are going the way they were written.

You should ask, if you have not graduated:

	YES	NO
1. Am I learning to be more independent?	☐	☐
2. Am I learning to work and live with people who are not disabled?	☐	☐
3. Does some of my training take place in the community?	☐	☐

You should ask, if you have graduated:

1. Am I working where I want to?	☐	☐
2. Am I living where I want to?	☐	☐
3. Do I get to see my friends?	☐	☐
4. Do I need any special help?	☐	☐

Are there things that could be better?

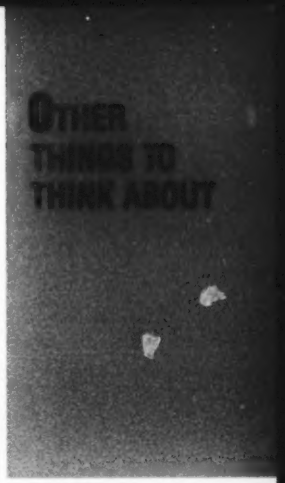
_____

_____

_____

_____

If there are a lot of "no" answers to these questions or if things could be going better, then you should ask to have another transition planning meeting.



The law:

For students who receive special education, the law says that everyone has the right to get the kind of education that he or she needs. If students need training in different types of community work before they graduate, this is something to ask for in the I.T.P. and the I.E.P. meeting.

Things we know about how people with disabilities learn:

1. People learn things best in the places where they happen — like shaving in the bathroom or making a bed in the bedroom.
2. People learn things best when they use the real item — like using real money when learning to count.
3. People learn things best when they do them at the time they are usually done — like brushing teeth after a meal or before going to bed.
4. People learn best from other people — like learning how to work from other people at work.
5. People learn best when the things that they learn are useful — like using the telephone or how to write a check.
6. It is important to think about things to learn that will help you become more independent where you live, work and have fun right now and where you will live and work and have fun in the future.

Original version developed
for Area IV Developmental
Disabilities Board
by William T. Allen

The ISEP guide was written so that people with developmental disabilities and their advocates or parents can become more involved in writing their own supported employment plan. Here are some ideas to think about in using it:

Provide it to the person 4-6 weeks before the supported employment planning meeting.

It could be placed on a tape for those who cannot read.

An audio tape of the consumer or parent ideas for the ISEP could be made for those who are nervous about speaking to a group.

Include time to review the guide during the planning meeting.

INDIVIDUAL SUPPORTED EMPLOYMENT PLANNING GUIDE:

Ideas on how to use it

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the supported employment planning activities on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the supported employment planning activities.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the supported employment planning activities.

WHAT THIS GUIDEBOOK IS ALL ABOUT

There are many more chances for people with developmental disabilities to earn money from a job than there used to be. Lots of people can work if they have the training they need to get a job and the help they need to keep it.

This guidebook will help you think about a lot of the things you will need to have written into your Individual Supported Employment Plan to make sure that it works for you.

SOME WORDS & TERMS YOU SHOULD KNOW

Follow-along: This is what happens after a person is placed on a job. If you need something to help you keep your job, there will be someone who can help you. This is called follow-along.

Individual Habilitation Plan: This is a written plan which tells a person's goals for work and the kind of training it will take to reach those goals.

Individual Program Plan: This is a written plan which tells what a person needs to be more independent.

Job-coach: This is the person who will help you get used to your new job. That means helping you learn how to do the job in the way that is best for you.

Placement: When a person starts to work at a new job. It happens by matching what the employer needs with what you have to offer as a worker. There are individual placements and placements with others like work crews or work stations.

Other terms or words I want to know:

Word or Term	What it Means

Some things to think about

There are some things that you should think about before you write your Individual Supported Employment Plan.

1. What kinds of support will you need to keep a job? For example, will you need help in writing checks or help with how to get along with other workers?
2. Will you need transportation to get to a job? Or do you know how to take a bus on your own?
3. How will working change where you live? Will you have to eat meals at a different time from everyone else at your house?
4. How will the money that you earn change any benefits that you get? Will you be able to keep your medical card if you work?
5. What will you do after work? How will you spend your free time?
6. What about your friends? Will you still be able to see them?

You may not know the answers to all of these questions right now, but you need to think about them. These are the kinds of questions you need to ask the people who help you write your supported employment plan.

If you have other questions about working, then write them below and talk about them when you have your individual supported employment plan meeting.

Things about you

Where do you live now?
- ☐ at home
- ☐ on my own
- ☐ supervised residence
- ☐ with a roommate
- ☐ other: _____

Where do you want to live in the future?
- ☐ at home
- ☐ on my own
- ☐ supervised residence
- ☐ with a roommate
- ☐ other: _____

What kinds of work do you do now?

What kind of work do you want to do in the future?

What type of benefits do you receive - like SSI or Medicaid?

How much a month? _____

What do you do for fun?

How do you get around in the community?

KNOWING THE THINGS YOU CAN DO AT WORK AND THE THINGS THAT YOU NEED HELP WITH

Take a few moments to think about the things that you know how to do at work and the things that you need help with and then write them down. Get someone to help you with this, if you need it.

Things that you know how to do at work (like use a drill or clean the office)

Things that you need help with at work (like using the soft drink machine)

A CHECKLIST FOR FUTURE WORK NEEDS

Here is a list of things which will help you start thinking about the kind of job you might like to find.

What kinds of jobs are there in your community?

Do you want to work:
☐ on your own (individual placement); or
☐ with others (enclave or work crew)

How long can you work?
☐ 4-6 hours
☐ 7-8 hours

Do you have any problems with walking?
☐ Yes ☐ No

Do you get to work on time?
☐ Yes ☐ No

Do you have medical insurance?
☐ Yes ☐ No

How do you get to and from a job?
☐ van ☐ parent
☐ take bus ☐ walk
☐ taxi ☐ ride bike

Are there times when you could not work?
☐ evenings
☐ weekends
☐ other: _____

Will you need help in:
☐ finding a job
☐ learning the job
☐ keeping the job

Do you have any problems with lifting?
☐ Yes ☐ No

Do you have any special physical needs?
☐ Yes ☐ No

If yes, what are they: _____

Do you get along with others?
☐ Yes ☐ No

Do you get social security benefits?
☐ Yes ☐ No

If yes, how much per month? _____

Do you need any special training?
☐ money management
☐ sex education
☐ cooking
☐ cleaning clothes
☐ other: _____

What kinds of things do you do for fun at home, in the neighborhood, community?

You may not know the answers to all of these questions right now, but you need to think about them. These are also the kinds of questions you need to ask the people who help you write your individual supported employment plan.

GETTING READY FOR YOUR INDIVIDUAL SUPPORTED EMPLOYMENT PLAN MEETING

Here are some things to do before the meeting:

- Review what you have written in this workbook.
- Remember to write down any questions you want to ask.
- Ask who else will attend the meeting and make sure that no one is left out.
- If you want help from someone else during the meeting, then ask for it.

Here are some things to do at the meeting:

- Show people this workbook and talk about the kinds of work you want to do and the kinds of support that will help you keep your job.
- Be positive.
- Ask questions.
- Take notes or bring a tape-recorder.
- Remind people that it's their job to help you get the kind of work that will be best for you.
- Ask for another meeting if you do not agree with the things that are written in your Individual Supported Employment Plan.

A CHECKLIST FOR YOUR MEETING

Here is a list of things you need to talk about when you meet to write out your supported employment plan. Just check them off as you talk abut them:

WORK PLACES.

- What kinds of jobs are there for you?
- Will you work on your own (individual placement) or with others (work crew or work station)?

THE KINDS OF HELP THAT YOU NEED.

- Help in finding a job, learning the job, keeping the job.

WORK STRENGTHS AND NEEDS.

- How long can you work (2 hours, 8 hours)?

- How hard can you work (lifting, walking)?
- Any special physical needs?

OTHER WORK STRENGTHS AND NEEDS.

- Do you get to work on time?
- Get along with others?

MONEY

- What about insurance, benefits, taxes, SSI/SSDI?

SPECIAL WORK NEEDS.

- Draft registration, social security number, driver's license, bus pass?

HOME AND WORK.

- How will you get to and from your job?
- Is your work schedule right for you and the people you live with?
- Are you moving soon?

OTHER TRAINING YOU MIGHT NEED.

- Taking the bus, taking care of money, cooking, cleaning?
- Sex education?

DOING THINGS WITH OTHER PEOPLE.

- Will there be chances for you to have fun with people at work, with family or with friends?

ANYTHING ELSE THAT YOU WANT TO TALK ABOUT.

YOUR WORKER'S HANDBOOK

There are things that you should know about where you work. If you fill out the list below, it will help you remember these things:

ABOUT THE JOB.

Name of the place where you work: _____

Address: _____ Phone: _____

What is your job: _____

Name of your supervisor: _____

What time do you start work? _____

What time are your coffee breaks? _____

When is lunch time? _____

What time is work over? _____

WORK RULES.

Is it okay to smoke? ☐ Yes ☐ No

Other special rules? _____

_____

_____

YOUR PAY.

How much do you get paid? _____

Do you get paid by the ☐ hour ☐ item ☐ day ☐ week?

When do you get paid? _____

YOUR BENEFITS.

Do you get paid holidays? ☐ Yes ☐ No

If yes, when are they? _____

_____

Do you get vacation days? ☐ Yes ☐ No

If yes, how many days per month? _____

Do you get paid sick leave? ☐ Yes ☐ No

If yes, how many days per month? _____

Is there medical insurance? ☐ Yes ☐ No

If yes, who pays for it? _____

Is there paid dental insurance ☐ Yes ☐ No

If yes, who pays for it? _____

OTHER THINGS YOU SHOULD KNOW.

What do you do if you get hurt? _____

What do you do if there is a fire? _____

Who do you go to if you have a problem? _____

What does it take to get a raise? _____

_____

What does it take to get fired? _____

_____

What is the 'grievance procedure'? _____

_____

METHODS OF CONSUMER-BASED EVALUATION

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In most service systems, it's the consumer that decides what does and does not work. Looking at a variety of services or products and deciding which one suits you best is another freedom of choice that we often take for granted. People with developmental disabilities should also have this freedom, for example:

- Choosing where to live;
- Choosing a job;
- Choosing service providers;
- Choosing a social worker;
- Evaluating where they live, work or go to school;
- Evaluating the staff who work with them.

Originally developed for Area IV Developmental Disabilities Board, 1983
Revised for LIFEPLAN, 1987
Adapted from the Site Visit Checklist (North Bay Regional Center, 1981)
by William T. Allen

THE HOUSING CHECKLIST
Ideas on how to use it

The Housing Checklist was written so that people with developmental disabilities can become more involved in looking at the places where they live and finding out what they like and what could be better. It can also be used by consumers and parents who are thinking about places to live in the future.

Encourage people to look at the place where they live and complete the checklist on their own or with the help of an advocate or friend.

Give it to consumers and parents who are thinking about living options for the first time.

An audio tape of the checklist could be made for those who do not read.

Include time to review the checklist during the annual service planning meeting.

HOW TO USE THIS CHECKLIST
(For people who live in the house)

Here is a way to look at the house where you live or the house where you might want to live. It will tell you things that are good about a house and things that could be better.

The best way to use this checklist to look at the house where you live would be:

1. Hold a meeting to tell other people who live in the house what you want to do and see if they will help you.
2. Tell the staff who work at the house what you want to do and ask when they can help you with the checklist.
3. Look at each number, read the words and then ask, "Is this the house where I live?"
4. Check "yes" or "no".
5. Ask someone to write notes about what you find out in the box next to the words.
6. When you are all done, share the good things with other people and staff.
7. If there are things that could be better, ask staff and others if they will help change them.

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the checklist on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the checklist.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the checklist.

HOW TO USE THIS CHECKLIST

(For people who want to live in a house)

The best way to use this checklist to look at a house where you want to live would be:

1. Make sure you get a chance to visit the house and look around.
2. Ask someone who lives or works at the house if they can help you with the checklist.
3. Look at each number, read the words and then ask "Is this the house where I want to live?"
4. Check "yes" or "no".
5. Ask someone to write notes about what you find out in the box next to the words.
6. When you are all done, share the good things with other people and staff.
7. If there are things that could be better, ask staff and others if they will help change them.
8. Think about all of these things before you decide if you want to live in the house or not.

HERE IS WHAT TWO NUMBERS FROM THE CHECKLIST MIGHT LOOK LIKE WHEN YOU ARE DONE:

What we know about the house

1. The house is near other houses where people live.

☒ YES ☐ NO

There are houses all around this house. Some have families with children, others have one or two people living in them.

19. There are things to do at the house for fun and exercise.

☒ YES ☐ NO

Everyday after dinner we walk around the block. On weekends we go to the movies or to baseball games or swimming.

What we know about the house

1. The house is near other houses where people live.

☐ YES ☐ NO

2. The house is close to stores, banks, places to eat and so on.

☐ YES ☐ NO

3. The house is clean inside and outside.

☐ YES ☐ NO

4. There is room to move around in the house without bumping into other people.

☐ YES ☐ NO

5. There is a way to get heat into each bedroom.

☐ YES ☐ NO

6. The bedrooms have a place to keep things, like a closet and chest of drawers.

☐ YES ☐ NO

7. The beds are nice to sleep on and are big enough for each person.

☐ YES ☐ NO

8. The house looks like a place for adults.

☐ YES ☐ NO

9. The bathrooms work well and are easy to get to.

☐ YES ☐ NO

10. There are staff around when you need help.

☐ YES ☐ NO

11. The staff know how to help when you need it.

☐ YES ☐ NO

12. Staff can understand what you say and you can understand what they say.

☐ YES ☐ NO

13. Staff have a van or car to take to places, like to the store or to the doctor.

☐ YES ☐ NO

14. Staff talk to you in a nice way and use your first name.

☐ YES ☐ NO

15. You can have friends and family come to the house and you can talk to them privately.

☐ YES ☐ NO

16. Staff are nice to your friends and family when they visit you.

☐ YES ☐ NO

17. Everyone has a written plan of training and activities.

☐ YES ☐ NO

18. There is training that goes on each day to help you work on your written plan.

☐ YES ☐ NO

19. There are things to do at the house for fun and exercise.

☐ YES ☐ NO

20. People can do things on their own like cook and wash clothes.

☐ YES ☐ NO

21. People go to the doctor and the dentist when they need to go.

☐ YES ☐ NO

22. The food tastes good and is good for you.

☐ YES ☐ NO

23. People get to choose things, like what clothes to wear and when to go to bed.

☐ YES ☐ NO

24. People know their rights and staff can explain them.

☐ YES ☐ NO

25. People do things in the community, like visit friends, go shopping or to parties.

☐ YES ☐ NO

26. Everyone helps make up the house rules.

☐ YES ☐ NO

27. People who live in the house want to live there.

☐ YES ☐ NO

28. You can get your own mail and use the telephone.

☐ YES ☐ NO

29. If you don't want to let someone in your room, you don't have to.

☐ YES ☐ NO

30. If staff help you with your money, they keep records of how it is spent and explain it to you.

☐ YES ☐ NO

Other things you know about the house:

Originally developed for
LIFEPLAN, 1987
by William T. Allen

THE WORKPLACE CHECKLIST: Ideas on how to use it

The WorkPlace Checklist was written so that people with developmental disabilities can become more involved in looking at the places where they work and finding out what they like and what could be better. It can also be used by consumers and parents who are thinking about places to work in the future.

Encourage people to look at the place where they work and complete the checklist on their own or with the help of an advocate or friend.

Use parts of the checklist to interview consumers during program evaluations.

Give it to consumers and families who are thinking about work programs for the first time.

An audio tape of the checklist could be made for those who do not read.

Include time to review the checklist during the annual I.P.P. meeting.

HOW TO USE THIS CHECKLIST

Here is a way to look at a training or employment service where you work or might want to work. It will tell you things that are good about a work program and things that could be better.

The best way to use this checklist is:

1. Look at each item, and check **yes or no.**
2. Write down notes about what you found out.
3. Think about all the things that you like about the work service.
4. If there are things that could be better, ask staff if they will help change them.

If you are thinking about a place where you might work:

5. Look at these notes and the notes you have on other work options and then see which one is best for you.
6. If you don't like what you see, then you might need to keep looking.

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the checklist on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the checklist.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the checklist.

HERE IS WHAT TWO NUMBERS FROM THE CHECKLIST MIGHT LOOK LIKE WHEN YOU ARE DONE:

What we learned about the training service

2. The training service uses stores, banks and other places, to teach things — like how to use money.

☒ YES ☐ NO

People learn to purchase items at the store. They also use the bank and the library.

13. People get paid for what they do.

☒ YES ☐ NO

People get paid the minimum wage.

What we learned about the training service

1. The training service is near places — like stores and banks.

☐ YES ☐ NO

2. The training service uses stores, banks and other places to teach things — like how to use money.

☐ YES ☐ NO

3. When you are learning things, you are in small groups — like 2 or 3 people.

☐ YES ☐ NO

4. Training will help people be more independent or get a job in the community.

☐ YES ☐ NO

5. The training service teaches things that adults need to know — like using the bus or how to use money.

☐ YES ☐ NO

6. There are chances to be around people who do not have disabilities, other than staff.

☐ YES ☐ NO

7. Staff talk to people at the training service like they talk to other adults.

☐ YES ☐ NO

What we learned about the employment service

8. Jobs are located at community businesses.

☐ YES ☐ NO

9. There is training for people when they first get a job.

☐ YES ☐ NO

10. There is training for people if they need extra help after they get the job, like changes in job duties.

☐ YES ☐ NO

11. People get to choose their jobs.

☐ YES ☐ NO

12. People get paid for what they do.

☐ YES ☐ NO

13. There is support for people if they need it, like help with social security.

☐ YES ☐ NO

14. There is an individual supported employment plan which covers many issues, like transportation, benefits, etc.

☐ YES ☐ NO

The Staff Evaluation was written so that people with developmental disabilities can become more involved in evaluating the people who work with them.

Encourage residential and training or work providers to use it.

Consider using it as a way to ask consumers to look at how you are doing as their case manager.

An audio tape of the checklist could be made for those who do not read.

STAFF EVALUATION

Ideas on how to use it

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the evaluation on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the evaluation.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the evaluation.

STAFF EVALUATION*

Name of Consumer: _____ (Optional)

Date: _____

We need your help in looking at how _____ does his or her job.
Here are some things we want to know:

1. What does _____ do?

2. Do you see or talk with _____? ☐ Yes ☐ No

   If yes, how often? _____

3. Can you talk about problems with _____?

4. Does _____ listen to you?

5. Is _____ doing a good job helping you with the things that you need to learn?

6. Does _____ do what he or she says he or she will do?

7. How does _____ treat you?

8. What are some things that _____ does well?

9. What are some things that _____ could do better?

*Adapted from Becoming Independent, Santa Rosa, CA

The IPP Checklist was written so that people with developmental disabilities can become more involved in asking for changes in their service plans when they are needed.

Provide it to all consumers.

Provide a self-addressed, stamped envelope, if needed.

An audio tape of the checklist could be made for those who do not read.

IPP CHECKLIST*

My name is _____
and I want to talk to you about:

- ☐ Work or School
- ☐ Home
- ☐ Learning some new things
- ☐ Moving
- ☐ Problems with friend or family
- ☐ Learning about sex and family planning
- ☐ Getting a ride to go to places in the community
- ☐ Help with money
- ☐ My health
- ☐ Other things

Date received: _____

Action: _____

*Adapted from work by
Katrice Jaco, Becoming
Independent, Santa Rosa, CA

IPP CHECKLIST
Ideas on how to use it

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the checklist on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the checklist.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the checklist.

QUALITY OF LIFE SURVEY

Ideas on how to use it

The Quality of Life Survey was adapted so that people with developmental disabilities can become more involved in evaluating where they live and work and in making changes in their lifestyle.

Encourage consumers to fill it out before the annual service plan meeting.

An audio tape of the survey could be made for those who do not read.

Include time to review the survey during the annual meeting.

ASK, OBSERVE, ASK OTHERS

First, try asking people who can read or understand words or sign to complete the survey on their own or with help.

Second, observe people who do not read or understand words or sign very well and act as their advocate (or choose someone else) in completing the survey.

Third, ask others who know the person well (like a friend or relative or service provider) to help complete the survey.

QUALITY OF LIFE SURVEY*

Name of Consumer: _____ Date: _____

I. YOUR JOB.

1. What do you do at work? _____

2. Who decided you should get this job? _____

3. What do you like about your work? _____

4. Do you want to work somewhere else? _____

   If yes, where? _____

   If yes, what stops you from changing your job? _____

II. YOUR HOME

1. Where do you live? _____

2. Who decided you should live there? _____

*Adapted from Quality of Life Index: A Consumer Questionnaire by Mary Biggs and Marylou Scavarda, September 1986 in QUALITY INDICATORS IN SUPPORTED EMPLOYMENT PROGRAMS: A Review System.

3. What do you like about living there? _____

_____

_____

4. Would you rather live somewhere else? _____

If yes, what stops you from moving? _____

_____

III. GETTING AROUND

1. How do you get to work? _____

_____

2. Would you rather get to work some other way? _____

If yes, how? _____

IV. YOUR COMMUNITY

1. What do you do after work and on weekends? _____

_____

_____

2. How do you get there? _____

_____

3. Who decides how you spend your time after work and on weekends? _____

_____

4. Would you rather do something different after work or on weekends? _____

If yes, what? _____

_____

_____

V. YOUR MONEY

1. Where does your money come from? _____

_____

2. Do you cash your own check(s)? _____

3. What do you like to spend your money on? _____

_____

_____

4. Who decides how you spend your money? _____

_____

5. Would you rather spend your money on something else? _____

If yes, how? _____

6. What stops you? _____

_____

_____

OTHER WAYS

There are other ways to include people with developmental disabilities in the evaluation of the programs they use. One way is to provide training for consumers to participate on evaluation teams. This has already happened successfully in some states. The key is to use information that is written in easy-to-understand language and to offer support and training.

For people who have fewer skills, there are additional ways to encourage participation:

- provide a support service assistant to help read and record notes;
- use a tape recorder;
- ask consumers to complete one part of the evaluation, e.g. questions which have to do with rights, etc.

The following pages provide some examples of evaluation information written in easy-to-understand language.

(Full text is available from Area IV Board on Developmental Disabilities, 1700 Second St., Suite 384, Napa, CA 94558 (707) 252-6644.)

EVALUATION INSTRUMENT:

A Normalization and Development Instrument (1978)

Original Version
Rights 8.2 **The agency receives feedback from individuals served.**

This can be done by regular group sessions which are designed to obtain suggestions from individuals as well as surveys, questionnaires, suggestion box, and meetings with individuals and their families to obtain comments. Give **partial** credit if the means used are informal and on an ad hoc basis, or if only one method is utilized. Give credit for **yes** if two of more means are used on a regular basis.

- ☐ yes
- ☐ partial
- ☐ noncompliance
- ☐ not known
- ☐ not applicable

Understandable Version
Rights 8.2 **People who go to the program are asked what they think about it.**

People who work at the program ask people what they think about it by meeting with them. They also write down people's ideas about what is good and what could be better. If they listen, but don't write anything down, then mark **sometimes.**

- ☐ yes
- ☐ sometimes
- ☐ never
- ☐ don't know
- ☐ does not apply here

ADAPTING EVALUATION PROCEDURES

EVALUATION INSTRUMENT

Proposed Residential Quality Assurance Standards, State of California Department of Developmental Services

Original Version
Rights 2.1

A statement of resident rights is posted where it is easily accessible to residents and visitors. The statement includes a description of procedures to be followed and whom to contact if the person has questions or complaints regarding rights.

Understandable Version
Rights 2.1

There should be a list of rights where people can see it every day. It should say who people can call for help about their rights.

Other evaluation instruments which are available and have successfully used consumer participation include:

Residential Evaluation Project
Area III Board on Developmental Disabilities
2400 Glendale Lane, Suite A
Sacramento, CA 95825

A Guide to Program Quality Review of Day Programs
State of Connecticut
Department of Mental Retardation
Available from Linda H. Rammler
286 Barbara Road
Middletown, CT 06457

(The full text of these standards in understandable language is available from Sonoma County Citizens Advocacy, P.O. Box 4449, Santa Rosa, CA 95402 (707) 578-6070.)

IDEAS ON MAKING THE SERVICE SYSTEMS UNDERSTAND-ABLE

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Another way to increase participation in the service system is to provide consumers with information that is easy to understand. People with developmental disabilities and their friends and advocates should have access to the same information that is available to all others. Access means understanding written materials:

- so that people with developmental disabilities who read, can read it and use it;
- so that people who advocate for those who cannot read, can explain it more easily;
- so that we can all understand something together.

It's really not difficult to do. Writing in an understandable way is writing in a more conversational style. It's how you would talk to someone who you know and respect. The following pages contain some examples.

Consumer Rights Statement

Rights are the things that the law says you should get, like the training that you need to live and work like everyone else. You have many rights when you work here:

You have the right to be by yourself when you want to be.

You have the right to be treated well by the staff.

You have the right to a safe place to work, where you won't get hurt.

People do not have the right to say or do bad things to you or keep you from eating or take your money.

You have the right to know the rules about working here.

You need to know what to do when you don't like something.

You have the right to speak up for yourself.

You have the right to ask for an advocate, or someone to speak up for you.

You can ask that a report about how you are doing be given to you, your family or your advocate.

You have the right to have your questions or concerns answered as soon as possible.

You have the right to have a place to keep your things.

You have the right to use a telephone for private calls.

None of your rights can be taken away without a chance for you to tell your side of the story.

You have a right to get the training you need to live and work more independently.

You have the right to see a doctor when you need to and without waiting a long time.

Staff cannot do things that might physically hurt you.

ADAPTING BY-LAWS

By-Laws of the Area IV Board on Developmental Disabilities

Original Version
Section 10.03 **All votes must be cast in person, not by proxy.**

Easy to Understand Version
Section 10.03 **You have to go to board meetings, if you want to vote on things.**

Original Version
Section 2.01 **Area IV Board is established by, and shall operate always in accordance with the provisions of, the Lanterman Developmental Disabilities Services Act, hereinafter referred to as the Lanterman Act, as passed by, and as may be amended by, the Legislature of the State of California.**

Easy to Understand Version
Section 2.01 **The area board will follow the law that is called the Lanterman Act.**

ADAPTING ELECTION INFORMATION

NOVEMBER, 1987 AN ELECTION WORKSHEET FOR PEOPLE WITH DISABILITIES IN CALIFORNIA

People with disabilities and their families make up about 14% of those who live in California. This can mean a lot of votes for those who are running for offices in November. So, it's important that everyone votes.

As you think about how to vote, here are some questions to ask yourself about the people who want your vote:

What will he/she do to help get more people with disabilities into jobs?

How will he/she support parents who choose to keep their children with disabilities at home?

What will he/she do to make homes for people with disabilities safe and good?

WHAT TO DO IF I DON'T LIKE SOMETHING: A GRIEVANCE PROCEDURE FOR CONSUMERS

If something happens to you in the place where you live or work and you think it takes away one of your rights, then you can start a grievance.

What are your rights? Rights are the things that laws say you should get, like the training that you need to live and work like everyone else.

What is a grievance? It is what happens if you think that the program is taking away one of your rights. A grievance gives you a chance to tell your side of the story and to try to get things changed.

What do you do?

1. Tell someone who works with you about the problem. They will help you write it down on a piece of paper.
2. This staff person will try to help you with your problem and tell you an answer to it in words and writing within 7 days.
3. If you don't like the answer, then you can take the problem to the Director of the program. The Program Director will then try to help you with your problem and tell you an answer to it in words and writing within 7 days.
5. If you don't like that answer, you can take the problem to your social worker.

PROMOTING SELF-ADVOCACY

E

"If you think you are handicapped,
you might as well stay indoors;
If you think you are a person,
come out and tell the world."

The late Raymond Loomis,
People First of Nebraska

All of the information presented in the previous sections is focused on helping people with developmental disabilities become more involved in the decisions which affect their lives. While we can advocate for others through the best of intentions in a consumer-oriented service system, the most important method of advocacy is self-advocacy. Self-advocacy is people speaking up for their own rights in their own individual ways.

SELF-ADVOCACY OBJECTIVES

We can help people become self-advocates through individual service plans. Training and experience in decision-making can be written into training objectives in many ways, depending on the needs and skills of consumers. The desired outcome of all of these objectives is more independence. Here are some examples:

Timing of events. For example, choosing when to get up on the weekend or when to go to bed at night or when to get a haircut or when to eat dinner.

> **Jack will be provided with at least 2 chances each day to choose the timing of an event at the places where he lives and works.**

Personal choices. For example, what clothes to wear, what shampoo to buy, which cereal to eat.

> **Jan will be provided with at least 2 chances each day to make personal choices at the places where she lives and works.**

Methods of training. For example, choosing between places where training will occur or who will provide the training.

> **Margaret will choose street-crossing sites near her home for mobility training.**

Staff evaluation. For example, through interviews with consumers or through observations of staff-consumer relationships.

> **Jack will participate in the evaluation of 3 staff members at the place where he lives.**

Hiring of staff. For example, asking consumers for input after potential staff have spent a day in the program.

> **John will participate on the agency Personnel Committee of the work program with support as needed.**

Agency board of directors. For example, a work training service or a regional center.

> **Margaret will attend 8 out of 10 board meetings within one year with support as needed.**

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Self-charting. For example, a picture symbol calendar for self-care and chores.

> **Jack will complete all of his self-care at home without staff reminders.**

Assertiveness training. For example, an assertiveness training class at the community college.

> **John will complete the assertiveness training class with assistance and transportation as needed.**

Self-advocacy training. For example, joining a local People First chapter.

> **Margaret will attend monthly People First meetings with assistance and transportation as needed.**

Annual planning meetings. For example, making sure that the consumer is present and allowing for time to make sure that he or she understands what is happening.

> **Jack will complete the IPP Planning Guide with assistance before the next annual meeting.**

SELF-ADVOCACY MATERIALS

"We are people first, and our handicaps are second. We wish people would recognize this and not give us a tag like handicapped or retarded."

People First of Nebraska

There are many materials which are now available to help train people in self-advocacy. They include:

Assertiveness: By Laura Crawford and Mary Hart-Furman. From People First of Washington, P.O. Box 381, Tacoma, WA 98401. $1.00

A curriculum for teaching the differences between non-assertive, assertive and aggressive behavior. Includes graphics for non-readers and skits for practicing the behaviors.

Evaluation-Every Person's Right. By Barbara Noone Gibbons and Jacqueline Osborne. From Kansas University Affiliated Facility, 348 Haworth, Lawrence, Kansas 66045. $2.50

Uses easy to understand language and pictures to explain what evaluation is, and one's right and need to evaluate services.

The Self-Advocacy Workbook. By Nancy E. S. Gardner. From Kansas University Affiliated Facility, 348 Haworth, Lawrence, Kansas 66045. $13.00

Covers many aspects of starting and running a self-advocacy group along with stories, questions and answers and checklists.

The People First Handbook. From People First of Washington, P.O. Box 381, Tacoma, WA 98401. $10.00

Decribes the philosophy of People First and how to start a chapter, e.g. choosing officers, handling money, etc.

How to Work with the System and Win. By Barbara Noone Gibbons and Jacqueline Osborne. From Kansas University Affiliated Facility, 348 Haworth, Lawrence, Kansas 66045. $2.50

This booklet offers illustrated steps on how to get across your point, for example, how to be assertive.

Advisor's Guide for Self-Advocacy. By J. Jeff Woodyard. From Kansas University Affiliated Facility, 348 Haworth, Lawrence, Kansas 66045. $4.00

This booklet was written to help advisors start self-advocacy groups and provides practical step-by-step information.

Board and Care. A rental film from Pyramid Films, P.O. Box 1048, Santa Monica, CA 90406-1048.

A movie about a woman who is forced to move away from her friends. It explores the issues of who should decide what is best for people.

People First. A rental film from James Stanfield & Associates, P.O. Box 1983, Santa Monica, Ca 90406.

A documentary about the second People First convention in Oregon in 1975. Presents information from consumers about what People First is all about and what it means to people.

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